Rogers Group Financial Chooses Raymond James Correspondent Services As Its New Carrying Broker

Vancouver, B.C. – June 15, 2015 – Rogers Group Financial has announced that it has chosen Raymond James Correspondent Services (RJCS) as its new carrying broker, a move designed to significantly enhance operational efficiencies for the benefit of its clients.

“Ensuring we chose a partner with the right culture and client-first approach was essential throughout our selection process,” says Clay Gillespie, Managing Director of Rogers Group Financial. “Raymond James Correspondent Services checked all of the boxes that we felt were key to our ability to serve the wealth management needs of our clients at the highest possible level.”

Rogers Group Financial is an independent Vancouver-based financial advisory firm founded in 1973. The firm has grown to be one of Canada’s most respected independent firms and today its team of 16 professional financial advisors and portfolio managers manage over $1.5 billion in assets on behalf of individual investors and their families.

Raymond James Correspondent Services is a division of investment dealer Raymond James Ltd, the Canadian arm of US-based Raymond James Financial Inc. The focus of RJCS is to leverage the North American platform of Raymond James and bring the full power of the firm’s clearing, custody and trade execution services to support Canadian registered broker/dealers and portfolio managers.

“We are all very excited to be working with Rogers Group Financial to help take their wealth management solutions to the next level,” says David Burnes, Senior Vice President and Head of Raymond James Correspondent Services. “They are a tremendous fit for Raymond James in many ways, but especially because of our shared cultures and values that underscore a common client-first focus. We look forward to cementing a strong foundation to support their ongoing growth and success.”

Raymond James is a leading North American independent full-service investment dealer offering an extensive range of professional investment products and services including: private client services portfolio management, financial and estate planning services, insurance, equity research, investment banking and institutional sales and trading. Through its network of more than 6,300 financial advisors and portfolio managers across Canada and the United States, Raymond James serves more than 2.6 million individual investors and their families, and oversees more than $500 billion in client assets on their behalf.

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